

What type of phone call is being made or received?			
TYPE OF COMMUNICATION	Outreach Call if this is an outbound call being made for the purpose of a referral.	EXAMPLE	Calling a contact to let them know about a vaccine event.
	Monitoring Call if this is a referral made as part of a standard initial or daily monitoring call (inbound or outbound).	EXAMPLE	Contact notes a resource need during initial assessment conversation, and you refer them to support.
	Incoming Request if this is an inbound call from a contact or case being made for the purpose of receiving a referral.	EXAMPLE	Contact calls seeking information about food assistance.
What was the context of the referral?			
TYPE OF CAMPAIGN	Awareness if you are providing general support information that is not connected to a specific event or request. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Providing education to a contact about vaccine availability in their area.
	Specific Event if you are providing this individual with information about an upcoming event. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Calling a contact to let them know about an upcoming vaccination event in their area.
	Specific Request if this individual requests information about a specific need. <i>(Typically a Monitoring Call or an Incoming Request.)</i>	EXAMPLE	On a monitoring call, a contact lets you know they need assistance with housing.

What type of referral is being made?			
KIND OF REFERRAL?	VACCINE		OTHER
	REFERRAL TYPE	RESOURCE	
OUTCOME OF THE REFERRAL?	Vaccine if the referral is for vaccination support.	REFERRAL TYPE Resource if the referral is for another resource need, such as food assistance, legal help, or transportation.	REFERRAL TYPE Other if the referral cannot be captured by "Vaccine" or any of the categories listed in "Resource."
		REFERRAL NEED Use this multi-select field to select one or more descriptors for this resource need.	REFERRAL TYPE DESCRIPTION Use the free-text field to add more information about this referral.
	OUTCOME OF REFERRAL <ul style="list-style-type: none"> Vaccine scheduled Already vaccinated Does not meet criteria for vaccine Does not want vaccine Transferred to LHD or vaccine hotline General information provided Other (will produce a free text field) 	OUTCOME OF REFERRAL <ul style="list-style-type: none"> Confirmed needs met Connected with CHW (if applicable) Pending Action (if the outcome of this referral is yet to be confirmed) Other (will produce a free text field) 	OUTCOME OF REFERRAL - OTHER <p>Free text field for you to provide information.</p>
		AGENCY The organization to which you have referred this individual: <ul style="list-style-type: none"> 211 CHW Local resource Other (will produce a free text field) 	
		AGENT NAME Free text field for the name of the person to whom you referred this individual.	
		HOW REFERRED The process used for this referral: <ul style="list-style-type: none"> Transferred to person (warm transfer) Transferred to phone number (cold transfer) Provided contact information (no transfer) Other (will produce a free text field) 	

DON'T FORGET: A referral does not take the place of a phone call logged in Timeline/Activities. You must log BOTH a phone call record and the referral record!